



Foreign Agricultural Service

**GAIN Report**

Global Agriculture Information Network

Required Report - public distribution

Date: 9/26/2000

GAIN Report #SP0039

**Spain**

**Fresh Deciduous Fruit**

**Annual**

**2000**

Approved by:

**Robert J. Wicks**

**U.S. Embassy**

Prepared by:

Magdalena Escudero

---

**Report Highlights:**

**Spain's apple and pear crops were reduced in marketing year 2000/01 due to unfavorable weather conditions in apple and pear producing areas. Imports of apples and pears are expected to increase. There are some opportunities for U.S. apples.**

---

Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
Madrid [SP1], SP

## Table of Contents

Executive Summary .....	Page 1 of 19
Production .....	Page 2 of 19
A. Fresh Apples .....	Page 2 of 19
B. Fresh Pears .....	Page 3 of 19
C. Fresh Table Grapes .....	Page 3 of 19
Consumption .....	Page 4 of 19
A. Fresh Apples .....	Page 4 of 19
B. Fresh Pears .....	Page 4 of 19
C. Table Grapes .....	Page 4 of 19
Trade .....	Page 5 of 19
A. Apples .....	Page 5 of 19
B. Fresh Pears .....	Page 5 of 19
C. Table Grapes .....	Page 6 of 19
Marketing .....	Page 6 of 19
A. Fresh Apples .....	Page 6 of 19
B. Fresh Pears .....	Page 6 of 19
C. Table Grapes .....	Page 6 of 19
PSD Table - Fresh Apples .....	Page 7 of 19
Import Trade Matrix - Fresh Apples .....	Page 8 of 19
Export Trade Matrix - Fresh Apples .....	Page 9 of 19
PSD Table -Fresh Pears .....	Page 10 of 19
Import Trade Matrix - Fresh Pears .....	Page 11 of 19
Export Trade Matrix - Fresh Pears .....	Page 12 of 19
PSD - Fresh Table Grapes .....	Page 13 of 19
Import Trade Matrix - Fresh Table Grapes .....	Page 14 of 19
Export Trade Matrix - Fresh Table Grapes .....	Page 15 of 19
Concentrated Apple Juice .....	Page 16 of 19
Production .....	Page 16 of 19
Consumption .....	Page 16 of 19
Trade .....	Page 16 of 19
PSD - Concentrated Apple Juice .....	Page 17 of 19
Import Trade Matrix - CAJ .....	Page 18 of 19
Export Trade Matrix CAJ .....	Page 19 of 19

## **Executive Summary**

Unfavorable weather conditions due to freezes in Spring, an irregular blossoming and hail storms during the blooming period in several apple producing areas significantly reduced the 2000/01 crop. According to farmers' organizations, total apple production for 2000/01 is forecast at 718,720 tons, about 19 percent lower than last year's crop. The 2000/01 pear crop, also affected by the same weather conditions, is estimated at 586,840 tons, about 14 percent below the previous year. Despite dry conditions that have prevailed throughout production areas, the 2000/01 table grape crop is forecast to reach about 356,600 metric tons, which would be about four percent below the previous year. Due to the lower crop expectations, 2000/01 deciduous fruit imports are forecast to increase, while exports are expected to decrease slightly. U.S. apple exports to Spain increased dramatically in 1999 to 2,480 metric tons from 815 tons in 1998, despite stiff competition from other suppliers. Opportunities continue to exist for U.S. apples in Spain, particularly red delicious and golden varieties. However, the continued strength of the dollar is hampering U.S. competitiveness. As Spain is a net pear and table grape exporter, it is not a large market for U.S. pears or table grapes.

Note: Current exchange rate is:  
190 pesetas/\$1.00.  
1 ECU = 166.38 Pesetas  
1 ECU = \$.87

## Production

### A. Fresh Apples

Early Spring freezes, followed by hailstorms in the main apple producing areas at the end of March and the middle of May, hampered the regular development of the apple crop. The total 2000/01 apple crop is estimated at 718,720 metric tons, about 19 percent below last year's crop. Of the total, table apples are estimated at 687,020 metric tons (about 18 percent lower than the previous year), while apple cider production is forecast to reach 31,700 tons (about 36 percent below the previous year). The quality of the fruit that can be commercialized for fresh consumption is reportedly good, firm in general and of larger size than last year due to the shorter crop. Most of the apple harvest started at the end of August, slightly earlier than usual.

About 60 percent of the apple crop is produced in Catalonia and in the Ebro river basin. Lerida, the main producing province, accounts for approximately 30 percent of national production. Total area planted to dessert apples (1997 data) is 44,500 hectares (ha), of which 43,400 ha are bearing. Cider apple production is concentrated in Asturias and the Basque Country in Northern Spain. Area planted to cider apples is 7,700 ha. Area of both crops has been declining slightly. Nevertheless, this situation is expected to change. Official data indicates that during 1999, the production of apple rootstocks in the Catalonia area increased by 14 percent to 1.4 million new plants. Total apple rootstock production in Spain in 1999, was 1,883,962 plants. The most popular varieties are bi-color, mainly Galas (30 %), followed by Golden varieties (28 %). In the province of Gerona, also in Catalonia, area planted to apples is growing. Golden (52.2%), Red Delicious and Starking (10.1%) and Gala (5.6%) are the primary varieties produced and demanded in Spain. Area planted to bi-colored varieties like Gala and Fuji has been increasing, while area planted to Golden and red varieties is decreasing. About 51 percent of apple trees planted in Spain are 10 years old, while only ten percent were planted 25 years ago. About 76 percent of the apple crop is produced under irrigation.

**Table Apple Production - Spain  
(Metric Tons)**

<b>Autonomous Community</b>	<b>1999</b>	<b>2000 (Forecast)</b>	<b>Percentage</b>
<b>Aragon</b>	168,400	124,400	-26.13%
<b>Catalonia</b>	463,350	406,800	-12.20%
<b>Castilla-Leon</b>	19,400	4,570	-76.44%
<b>Extremadura</b>	26,600	21,350	-19.92%
<b>Murcia</b>	15,456	10,700	-30.77%
<b>Other</b>	144,100	119,200	-17.28%
<b>TOTAL</b>	<b>837,366</b>	<b>687,020</b>	<b>-17.95%</b>

## B. Fresh Pears

Unfavorable weather conditions noted above, hampered development of the 2000/01 pear crop. Current marketing year pear crop is estimated at 586,840 metric tons. Fruit quality is reportedly good.

About 70 percent of the pear crop is produced in Northeastern Spain and in the Ebro river basin. Lerida, the main producing province, accounts for approximately 43 percent of national production. Total area planted to pears (1997 data) is 39,000 hectares (ha), of which 35,000 ha are bearing. Blanquilla, Conference, Ercolini and Limonera (Jules Guyot) are the most common pear varieties in Spain. Practically all of the pear crop (97.5 percent) is produced under irrigation.

About 47 percent of the pear trees are less than 10 years old, while only 14 percent are 25 years or over. Official data indicates that in 1999 a total of 1,299,368 rootstocks were produced in Spain, of which 737,500 units were produced in Catalonia, representing an increase of 19 percent in this Autonomous community. The main varieties were Conference, Williams and Limonera.

### Pear Production - Spain (Metric Tons)

Autonomous Community	1999	2000 - Forecast	Percentage
Aragon	116,220	109,000	-6.21%
Catalonia	351,890	312,990	-11.05%
Rioja-Navarra	45,860	43,550	-5.04%
Extremadura	54,466	29,700	-45.47%
Murcia	38,897	28,300	-27.24%
Others	75,150	63,300	-15.77%
<b>TOTAL</b>	<b>682,483</b>	<b>586,840</b>	<b>-14.01%</b>

## C. Fresh Table Grapes

Due to dry weather in eastern and southern Spain, the 2000/01 table grape crop is estimated at 356,600 metric tons, about four percent lower than the previous year. About 62 percent of this crop is located in the Valencia region.

## **Consumption**

### **A. Fresh Apples**

While the recovery of the economy has increased overall fruit consumption, fresh apple consumption remains relatively stable although this year it is expected to decrease due to a shorter crop. Fruit in Spain is considered a dessert and must compete with increased consumption of dairy products. Spanish and EU authorities continue organizing campaigns to increase apple and citrus consumption. Apples are the third most popular fruit in Spain, after oranges and bananas.

### **B. Fresh Pears**

Fresh pear consumption is basically stable, with year-to-year fluctuations reflecting domestic production levels and availability. The main varieties consumed in Spain are Blanquilla, Ercolini and Conference, with Blanquilla the favorite among consumers. Pears rank sixth among the most consumed fruits in Spain.

### **C. Table Grapes**

Consumption of table grapes is forecast to decrease slightly from the previous year due a decrease in production. Moscatel is the most appreciated variety in Spain. Table grapes are the ninth most commercialized fruit in Spain. Seedless grapes are becoming more common in Spain, although price is a constraint to expanding demand.

## Trade

### A. Apples

Spanish apple imports are estimated to have decreased significantly during marketing year 1999/00, due to higher domestic production. During the first nine months of marketing year 1999/00 (July-1999/March-2000) apple imports totaled 136,613 metric tons. Based on that pace, imports are estimated to have reached about 140,000 tons, about 34 percent lower than the previous year. France, Italy and Chile were the major suppliers. Apple imports during calendar year 1999 totaled 216,052 metric tons, which was about 44 percent above the previous year. With lower crop expectations for 2000/01, imports are forecast to increase.

According to Spanish Customs data, in CY 1999, 2,480 tons of U.S. apples were imported directly into Spain, a dramatic increase from 815 tons in 1998. However, it is difficult to determine exactly the amount of U.S. apples marketed in Spain as they often pass customs in other EU countries and are then shipped to Spain. More imports of U.S. apples during calendar year 2000 could be expected, although the continued strength of the dollar is handicapping U.S. exports. Nonetheless, Spain's fruit importers continue to express interest in importing U.S. apples, particularly Red Delicious and Golden varieties. Continued promotional efforts are required to increase Spanish importer and consumer awareness of the quality and of the many different varieties of apples that the United States can offer. The most important period to market U.S. apples in Spain is during the November-March period, before the Southern Hemisphere crop reaches Spain.

Spanish exports of apples during the first nine months of 1999/00 marketing year amounted to 38,680 metric tons, about 35 percent lower than during the same period of the previous marketing year. Portugal was the main destination. Exports during calendar year 1999 amounted to 49,244 metric tons, a 17 percent decrease from the previous year. Apple exports are forecast to be lower in 2000/01 due to the reduced domestic crop.

### B. Fresh Pears

Spanish imports of pears during the first nine months of the marketing year 1999/00, amounted to 17,220 metric tons, about 56 percent lower than the same period a year earlier. Imports during calendar year 1999 were 32,545 metric tons, about 19 percent higher from 1998. The bulk of imports continues to be sourced from other EU countries and Chile. No U.S. pear imports were reported for calendar year 1999. Imports are expected to increase in 2000/01 as a result of lower domestic supplies.

Spanish exports during the first nine months of marketing year 1999/00 amounted to 122,361 metric tons, a dramatic increase of 37 percent from the previous year due to a shorter output in other EU producing countries. Major destinations were Italy, Germany and Greece. Total exports during calendar year 1999 were 125,122 metric tons, about a 25 percent increase in comparison with the previous calendar year. In 2000/01, however, exports are forecast to decrease slightly due to the smaller crop.

### **C. Table Grapes**

Spanish imports of table grapes during the 1999 marketing year amounted to 20,930 metric tons, slightly higher than the previous year. Italy and Chile were again the major suppliers. As a result of lower production, imports are forecast to increase in 2000. Spain is a net grape exporter, and the harvest of the U.S. table grape crop coincides with the Spanish harvesting period for this product; thus, Spain has little potential as a U.S. table grape market.

Spanish exports of table grapes during the 1999 marketing year were 100,040 metric tons, a slight increase from the previous year. Major markets are other EU countries, mainly Germany, Portugal, France and the United Kingdom. Exports are expected to decrease in 2000 in line with forecast for lower domestic supplies.

## **Marketing**

### **A. Fresh Apples**

U.S. quality apples have good market opportunities in Spain, as long as they are crispy and well-colored. Red U.S. varieties have the greatest marketing opportunities, followed by Golden. The main constraint to U.S. apple exports to Spain is high price relative to prices from other suppliers. This year the strong dollar will make it more difficult to increase exports to Spain. Nevertheless, if a need emerges for Spain to turn to alternative suppliers, U.S. high quality apples will have a niche in the Spanish market. To tap into this potential, suppliers will need to be more aggressive in promoting U.S. apples in Spain, stressing quality and fruit size. Spain's importers and consumers are already aware of the texture and flavor of U.S. apples, but more fruit importers and distributors must be educated about this good quality product.

### **B. Fresh Pears**

Only in years of reduced crops is Spain a potential market for U.S. pears. EU suppliers are in a better position to supply winter pears due to lower transport costs from other EU countries. Every year Spain also imports more off-season pears from the Southern Hemisphere to provide the market with a continuous supply.

### **C. Table Grapes**

Spain is a difficult market for U.S. grapes since it is a major exporter of grapes and has a long growing season concurrent with the U.S. season.

## PSD Table - Fresh Apples

PSD Table						
Country	Spain					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Planted	49000	49000	49000	49000	0	49000
Area Harvested	46000	46000	46000	46500	0	46500
Bearing Trees	11150	0	11150	0	0	0
Non-Bearing Trees	250	0	250	0	0	0
Total Trees	11400	0	11400	0	0	0
Commercial Production	675000	686000	789000	842700	0	682700
Non-Comm. Production	25000	35600	30000	44000	0	36000
TOTAL Production	700000	721600	819000	886700	0	718700
TOTAL Imports	180000	210800	140000	140000	0	180000
TOTAL SUPPLY	880000	932400	959000	1026700	0	898700
Domestic Fresh Consump	665000	665700	670000	685000	0	660000
Exports, Fresh Only	55000	63700	65000	76000	0	70000
For Processing	150000	160000	160000	185000	0	160000
Withdrawal From Market	10000	43000	64000	80700	0	8700
TOTAL UTILIZATION	880000	932400	959000	1026700	0	898700

**Import Trade Matrix - Fresh Apples**

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Apples		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1998		1999
U.S.	815	U.S.	2,480
Others		Others	
France	81,183	France	89,862
Chile	24,384	Italy	46,965
Italy	15,357	Chile	35,117
Portugal	7,954	Portugal	10,798
Argentina	5,572	Argentina	8,699
Czech. Republic	3,418	New Zealand	3,036
Total for Others	137868		194477
Others not Listed	10,375		19095
Grand Total	149058		216052

**Export Trade Matrix - Fresh Apples**

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Apples		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Portugal	39,472	Portugal	33,475
Germany	5,192	Morocco	4,709
France	3,549	France	3,156
Italy	1,697	Germany	2,095
Netherlands	1,588	Netherlands	1,511
United Kingdom	1,451	Italy	1,083
Greece	1,335	United Kingdom	710
Total for Others	54284		46739
Others not Listed	4,539		2,505
Grand Total	58823		49244

## PSD Table -Fresh Pears

PSD Table						
Country	Spain					
Commodity	Fresh Pears					
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Area Planted	39000	39000	39000	39500	0	40000
Area Harvested	36800	36800	36800	37000	0	37500
Bearing Trees	0	9200	0	0	0	0
Non-Bearing Trees	0	550	0	0	0	0
Total Trees	0	9750	0	0	0	0
Commercial Production	544000	532000	555000	662500	0	565000
Non-Comm. Production	20000	25000	20000	20000	0	20000
TOTAL Production	564000	557000	575000	682500	0	585000
TOTAL Imports	38000	40900	30000	20000	0	30000
TOTAL SUPPLY	602000	597900	605000	702500	0	615000
Domestic Fresh Consump	440000	450600	445000	500000	0	455000
Exports, Fresh Only	95000	92300	100000	130000	0	95000
For Processing	35000	35000	35000	40000	0	45000
Withdrawal From Market	32000	20000	25000	32500	0	20000
TOTAL UTILIZATION	602000	597900	605000	702500	0	615000

### Import Trade Matrix - Fresh Pears

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Pears		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Belgium	6,604	Belgium	9,761
Netherlands	5,383	Netherlands	6,891
Chile	5,177	Chile	6,754
France	2,208	Argentina	2,273
South Africa	1,535	France	1,674
		Italy	1,456
		South Africa	1,109
Total for Others	20907		29918
Others not Listed	6,447		2,627
Grand Total	27354		32545

## Export Trade Matrix - Fresh Pears

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Pears		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1998		1999
U.S.		U.S.	8
Others		Others	
Italy	19,303	Italy	42,255
Greece	16,944	Germany	25,006
Portugal	14,726	Greece	15,548
Germany	12,583	France	12,474
France	10,828	Portugal	8,805
		United Kingdom	3,833
		Netherlands	3,178
Total for Others	74384		111099
Others not Listed	25,620		14,015
Grand Total	100004		125122

**PSD - Fresh Table Grapes**

PSD Table						
Country	Spain					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Area Planted	32000	32000	32000	32000	0	32000
Area Harvested	31000	31000	31000	31000	0	31000
Commercial Production	340500	340000	360000	352200	0	338600
Non-Comm. Production	10000	10000	15000	18000	0	18000
TOTAL Production	350500	350000	375000	370200	0	356600
TOTAL Imports	19900	19900	10000	21000	0	25000
TOTAL SUPPLY	370400	369900	385000	391200	0	381600
Domestic Fresh Consump	245700	250000	250000	255000	0	255000
Exports, Fresh Only	92700	92700	100000	100000	0	95000
For Processing	25000	25000	28000	30000	0	30000
Withdrawal From Market	7000	2200	7000	6200	0	1600
TOTAL UTILIZATION	370400	369900	385000	391200	0	381600

### Import Trade Matrix - Fresh Table Grapes

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Table Grapes		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	13
Others		Others	
Italy	12,201	Italy	11,131
Chile	2,808	Chile	3,759
South Africa	2,053	South Africa	2,845
France	1,595	Israel	1,280
		France	897
Total for Others	18657		19912
Others not Listed	1,263		1,005
Grand Total	19920		20930

**Export Trade Matrix - Fresh Table Grapes**

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Table Grapes		
Time period	C.Y.	Units:	Meetric Tons
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Portugal	28,209	Germany	25,223
Germany	20,705	Portugal	21,395
France	15,404	France	20,510
United Kingdom	15,141	United Kingdom	16,580
Netherlands	4,550	Netherlands	4,580
Italy	2,816	Italy	3,535
Total for Others	86825		91823
Others not Listed	5,887		8,217
Grand Total	92712		100040

## **Concentrated Apple Juice**

### **Production**

As a result of a lower apple crop, 2000/01 marketing year concentrated apple juice (CAJ) production in Spain is forecast at around 18,000 metric tons. Data shown in the PS&D table are all expressed in terms of 70-71 brix concentrated juice.

### **Consumption**

Consumption is increasing slightly every year. Consumption of apple based beverages is an estimated 12,500 liters, representing only 0.4 percent of total beverages consumption in Spain.

### **Trade**

Spanish CAJ imports during the first nine months of marketing year 1999/00 were slightly lower than during the previous marketing year. Most CAJ imports came from Germany and the Netherlands. Imports are forecast to increase in 2000/01. Imports in 1999, were 5,620 metric tons.

Spanish CAJ exports during the first nine months of marketing year 1999/00 (July-99/March-00) were 14 percent higher than the previous marketing year. Germany and Austria were the major destinations. Exports in 2000/01, however, are forecast to decrease in line with expectations of a smaller apple crop. Total exports during calendar year 1999 were 21,219 metric tons.

**PSD - Concentrated Apple Juice**

PSD Table						
Country	Spain					
Commodity	Concentrated Apple Juice				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Deliv. To Processors	150000	160000	160000	185000	0	160000
Beginning Stocks	0	0	0	1200	0	2700
Production	15600	18000	0	21000	0	18000
Imports	6000	4200	0	4000	0	4000
TOTAL SUPPLY	21600	22200	0	26200	0	24700
Exports	15900	14000	0	16000	0	14000
Domestic Consumption	5700	7000	0	7500	0	8000
Ending Stocks	0	1200	0	2700	0	2700
TOTAL DISTRIBUTION	21600	22200	0	26200	0	24700

### Import Trade Matrix - CAJ

Import Trade Matrix			
Country	Spain		
Commodity	Concentrated Apple Juice		
Time period	C.Y.	Units:	Metric Tons
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
South Africa	2,505	Germany	2,345
Germany	2,013	Netherlands	1,809
France	626	China	677
Netherlands	246	Turkey	660
Total for Others	5390		5491
Others not Listed	1,375		129
Grand Total	6765		5620

**Export Trade Matrix CAJ**

Export Trade Matrix			
Country	Spain		
Commodity	Concentrated Apple Juice		
Time period	C.Y.	Units:	Metric Tons
Exports for:	1998		1999
U.S.	54	U.S.	890
Others		Others	
Lybia	3,761	Germany	9,667
France	2,172	Austria	4,066
United Kingdom	1,882	United Kingdom	2,667
Japan	1,673	France	1,747
Germany	1,433	Japan	1,002
Portugal	1,197		
Total for Others	12118		19149
Others not Listed	2,641		1180
Grand Total	14813		21219